



جابتن كماجوان قلنچوغن
كمنترين سومبر اوتام دان قلنچوغن
JABATAN KEMAJUAN PELANCONGAN
KEMENTERIAN SUMBER-SUMBER UTAMA DAN PELANCONGAN

STRATEGIC PLAN TOURISM DEVELOPMENT DEPARTMENT FOR YEAR 2020-2022

MINISTRY OF PRIMARY RESOURCES AND TOURISM
BRUNEI DARUSSALAM

BRUNEI
ABODE OF PEACE

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VISION

Increased in tourist arrivals that contribute significantly to the growth of the tourism related economic activities



MISSION



Strengthening and diversifying tourism attractions and products as well as improving the facilities and quality of their services

1. Increase the number of tourist arrivals by air from **158,000 tourists** in 2020 to **174,000 tourists** by 2022 contributing to the growth of tourism receipt and Gross Domestic Product (GDP) of Brunei Darussalam;
2. Strengthen and enhance the **Primary Tourism Product** such as "Temburong, Kampong Ayer and Bandar Seri Begawan" and followed by "Belait" and "Tutong", as the main tourist attractions within the region and internationally;
3. Introducing **Emerging Tourism Product** as potential destinations by developing the Beaches (such as Serasa, Muara and Seri Kenangan) and Recreation Parks (such as Sungai Basong Recreational Park, Tasek Merimbun Heritage Park and Labi);
4. Develop **Activity-based Tourism Products** such as Adventure & Sports, Bird Watching, Diving, Education, Islamic Tourism, Community-based Tourism, Cruise Tourism and annual events such as Brunei Gastronomy and Brunei December Festival at the regional and international level;
5. Promote **MICE** (Meetings, Incentives, Conventions & Exhibitions) to attract professionals, experts and special interest groups such as Brunei International Flower Show dan MYCE Brunei;
6. Promote **Domestic Tourism (Selera Bruneiku)** through local culinary food journey and activities at places of interest as well as local products;

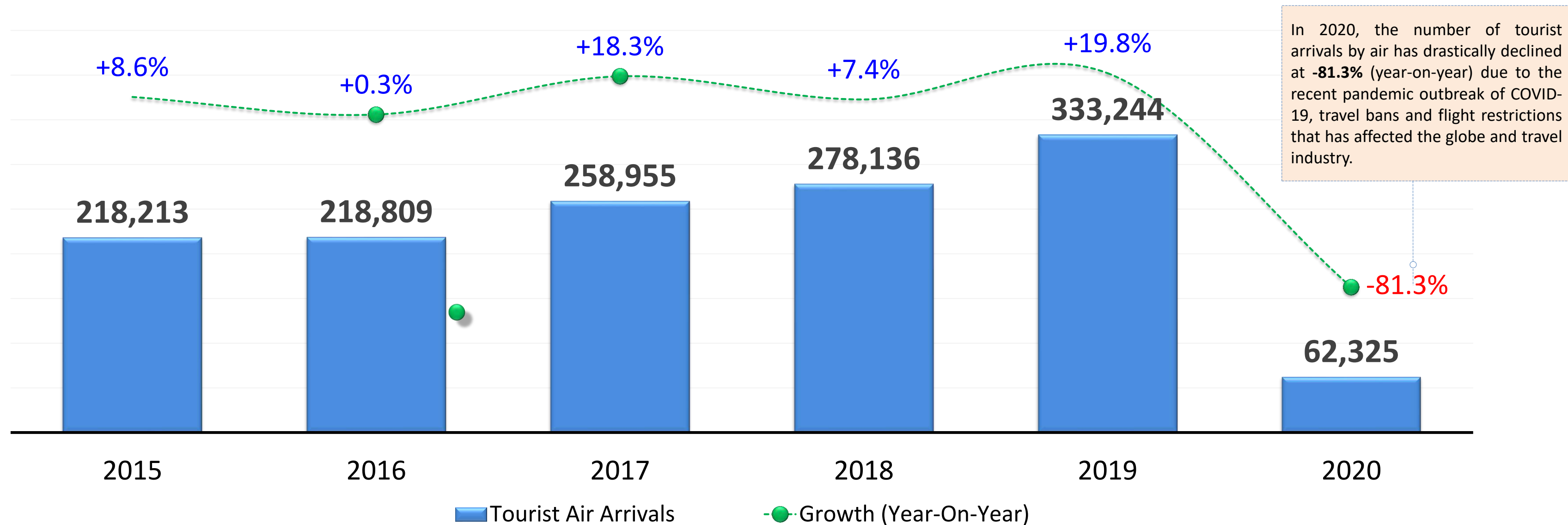
7. Enhance the capacity dan competency of **manpower** in the tourism industry to provide skilled and professional personnel for quality services;
8. Upgrade the **standard of tourism facilities and regulatory** in terms of cleanliness, safety and comfort of tourists;
9. Expand local and international **marketing and promotion** activities through collaboration with Private sectors such as Travel Agents, Hotels, Airlines, Restaurants and Tourism Service Providers; and
10. Reduce dependency on government spending to **diversify products and services as well as programme implementation** through Public-Private Partnership (PPP).



TOURISM STATISTICS



INTERNATIONAL TOURIST ARRIVALS TO BRUNEI BY AIR, 2015 – 2020

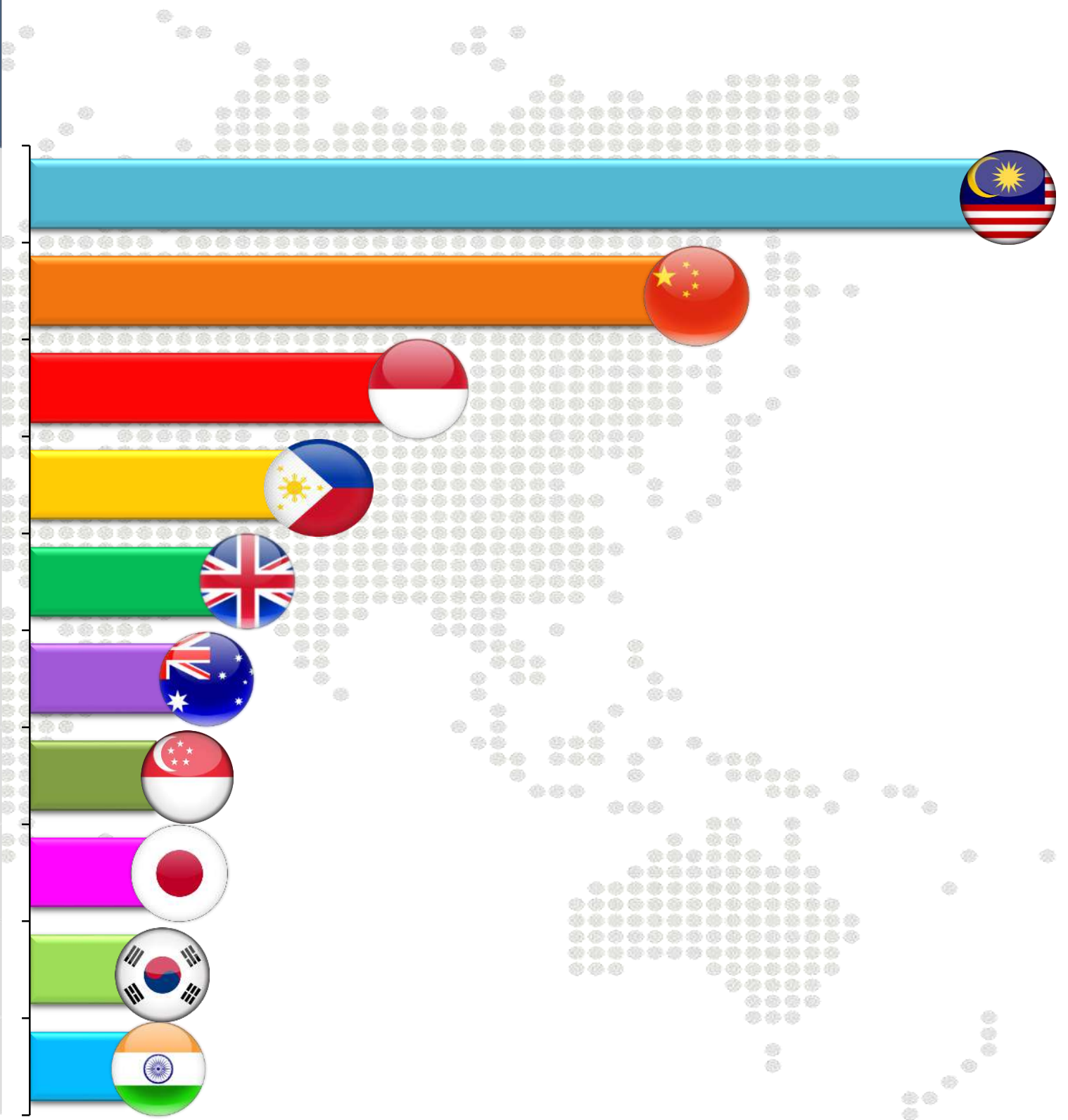


Note:

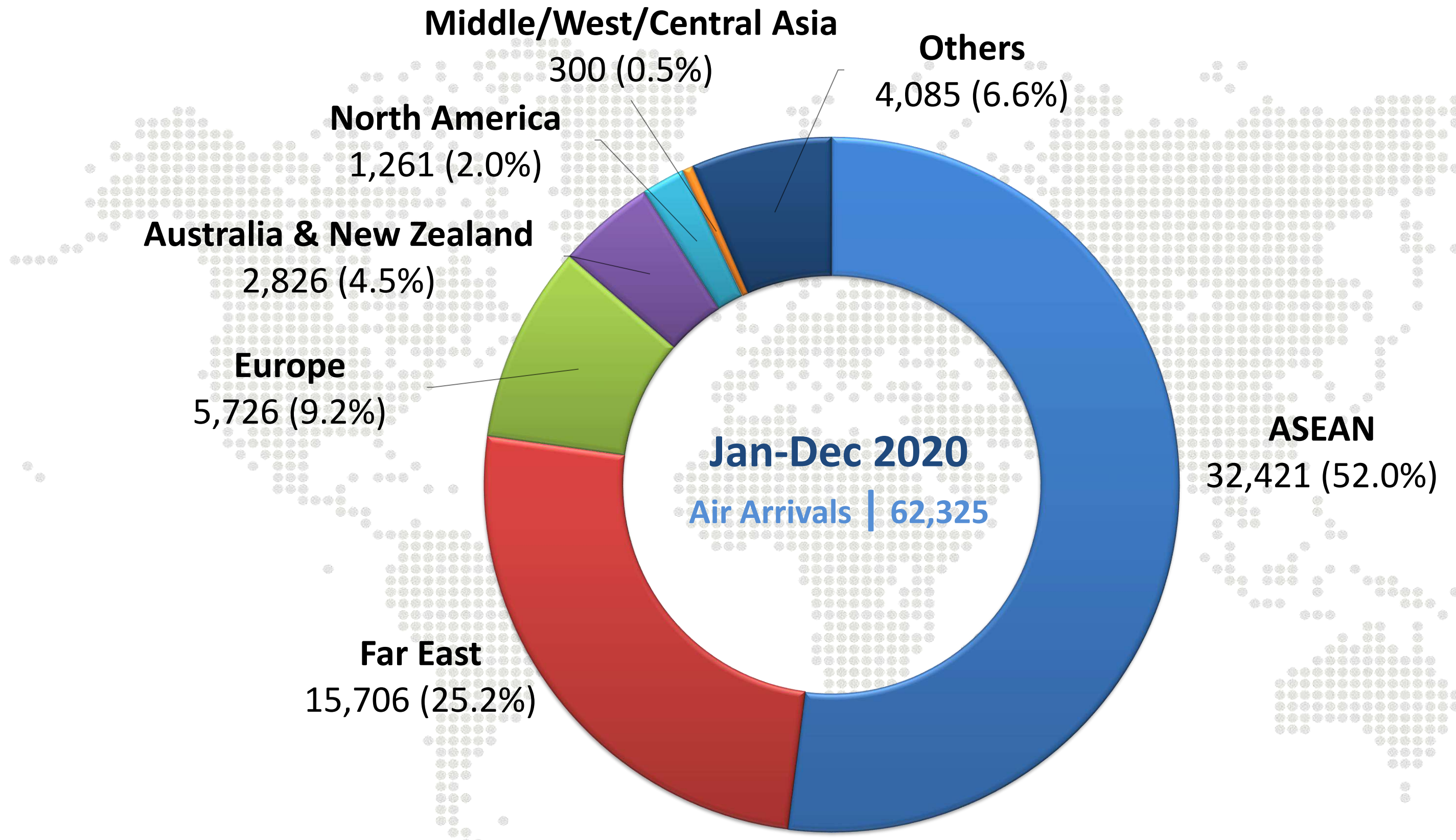
1. For 2020, the number of tourist arrivals by air has significantly declined at **81.3%** (year-on-year) due to the recent pandemic outbreak of COVID-19 that has affected the globe and travel industry;
2. The month of January was the highest number of tourist arrivals at 34,101 tourists contributed from the recent ASEAN Tourism Forum 2020 in Brunei Darussalam and Chinese New Year celebration. Unfortunately, with the advent of the pandemic COVID-19 the number of tourist arrivals began to de-escalate from February onwards due to travel restrictions and flight suspensions; and
3. Currently, only essential travellers (important travellers) are permitted to enter the country by the end of March 2020 and mainly for the purpose of official visits, health purposes, education, businesses and employment.

INTERNATIONAL TOURIST AIR ARRIVALS FROM TOP 10 COUNTRIES, 2019 & 2020

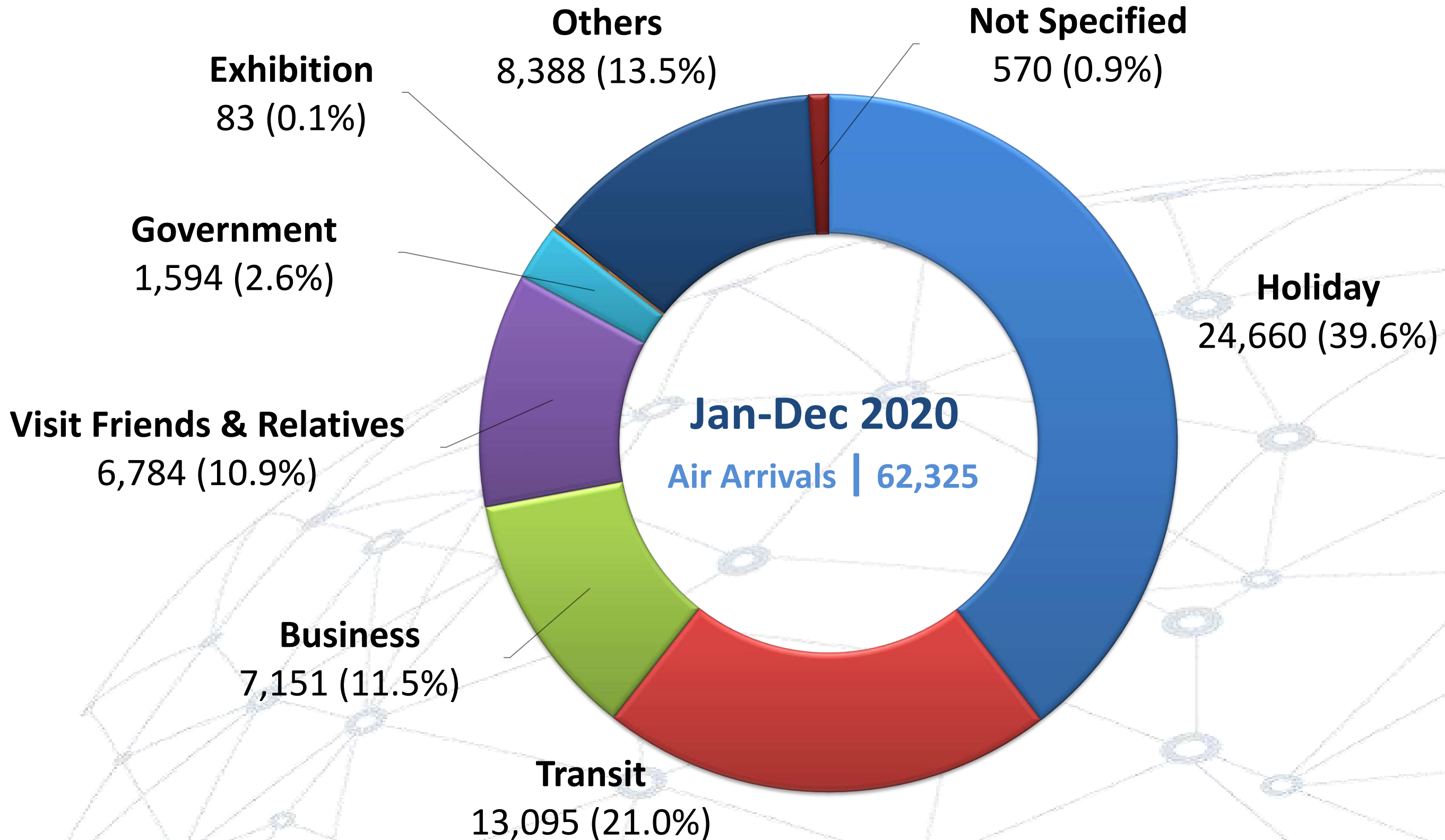
Rankings 2019	Rankings 2020	Countries	No. of Arrivals 2019	No. of Arrivals 2020	Growth (Y-O-Y)
1	1	Malaysia	82,876	16,869	-79.6%
2	2	China	74,511	11,329	-84.8%
3	3	Indonesia	33,626	6,262	-81.4%
4	4	Philippines	24,584	4,562	-81.4%
7	5	United Kingdom	14,198	3,407	-76.0%
9	6	Australia	10,188	2,597	-74.5%
6	7	Singapore	14,789	2,226	-84.9%
8	8	Japan	10,680	2,135	-80.0%
5	9	South Korea	15,767	1,939	-87.7%
10	10	India	8,925	1,750	-80.4%



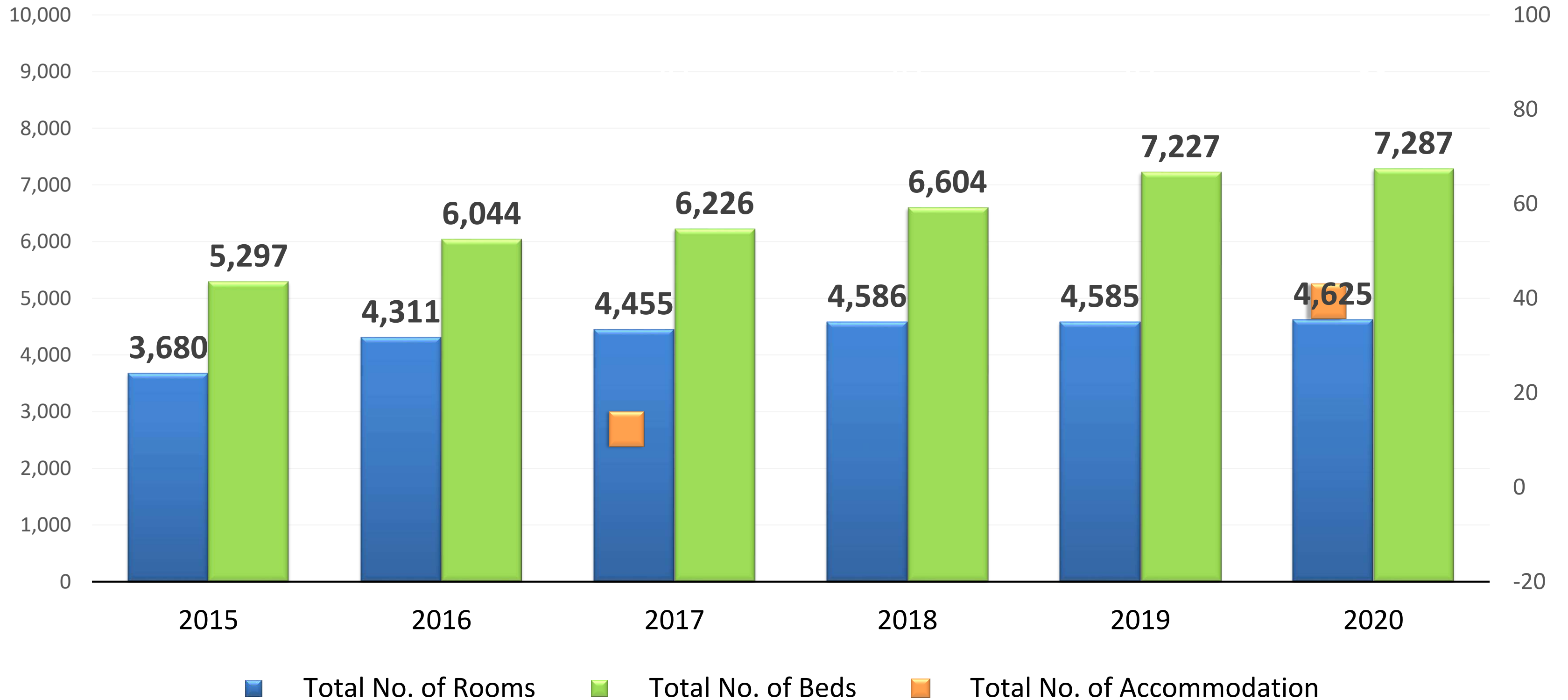
INTERNATIONAL TOURIST AIR ARRIVALS BY REGION, 2020



INTERNATIONAL TOURIST AIR ARRIVALS BY PURPOSE OF VISITS, 2020



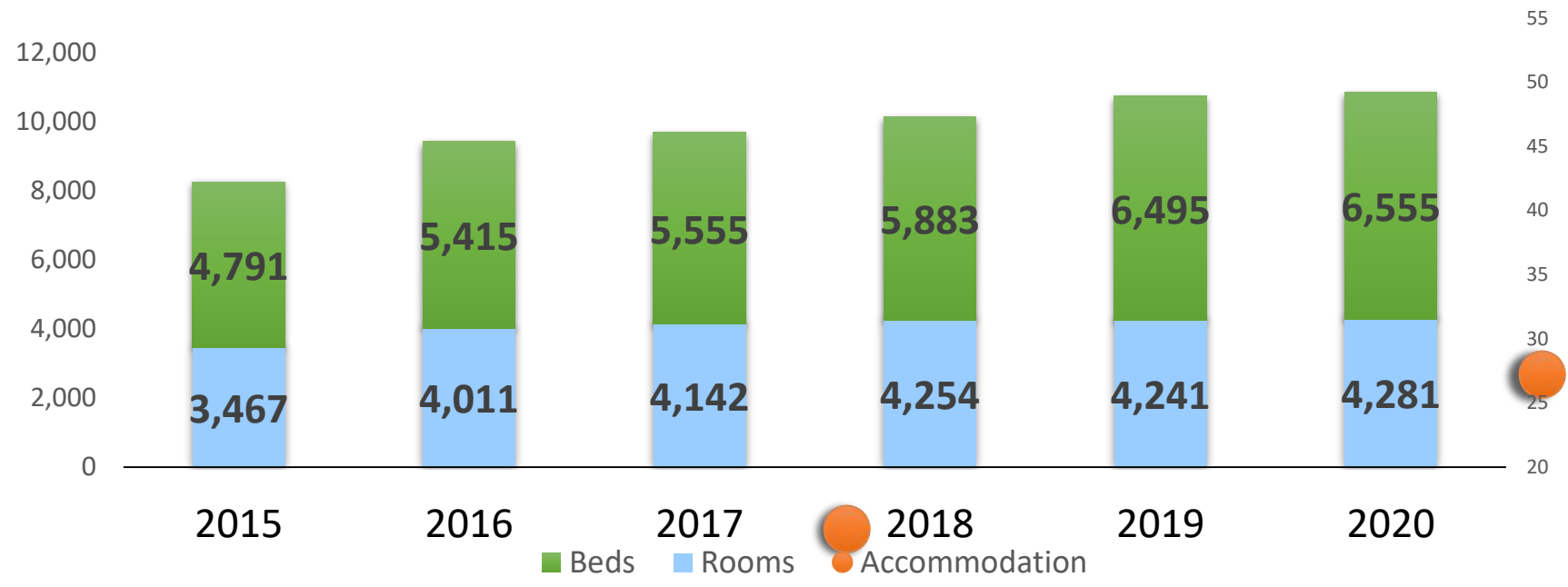
ACCOMMODATION, 2015 - 2020



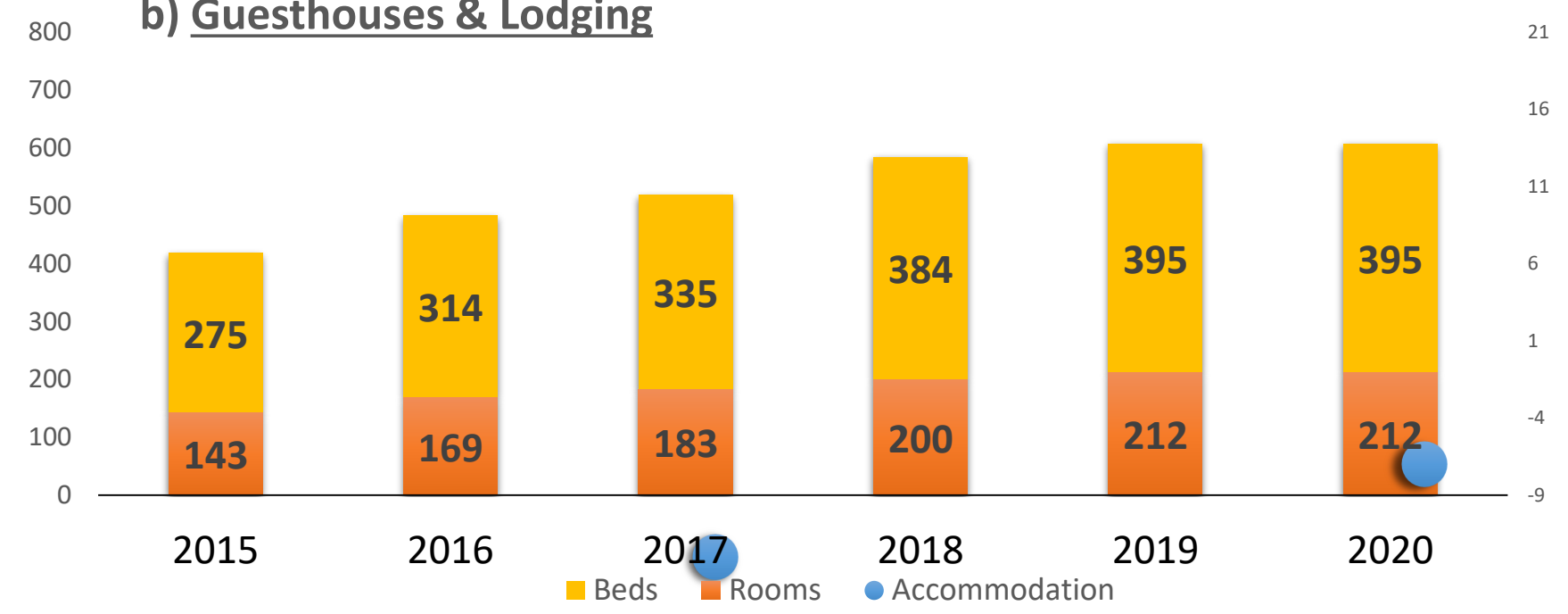
Note: Based on Hotel, Resort & Apartment; Guesthouses & Lodging; Government Guesthouses and Homestay.

TYPES OF ACCOMMODATIONS, 2015 - 2020

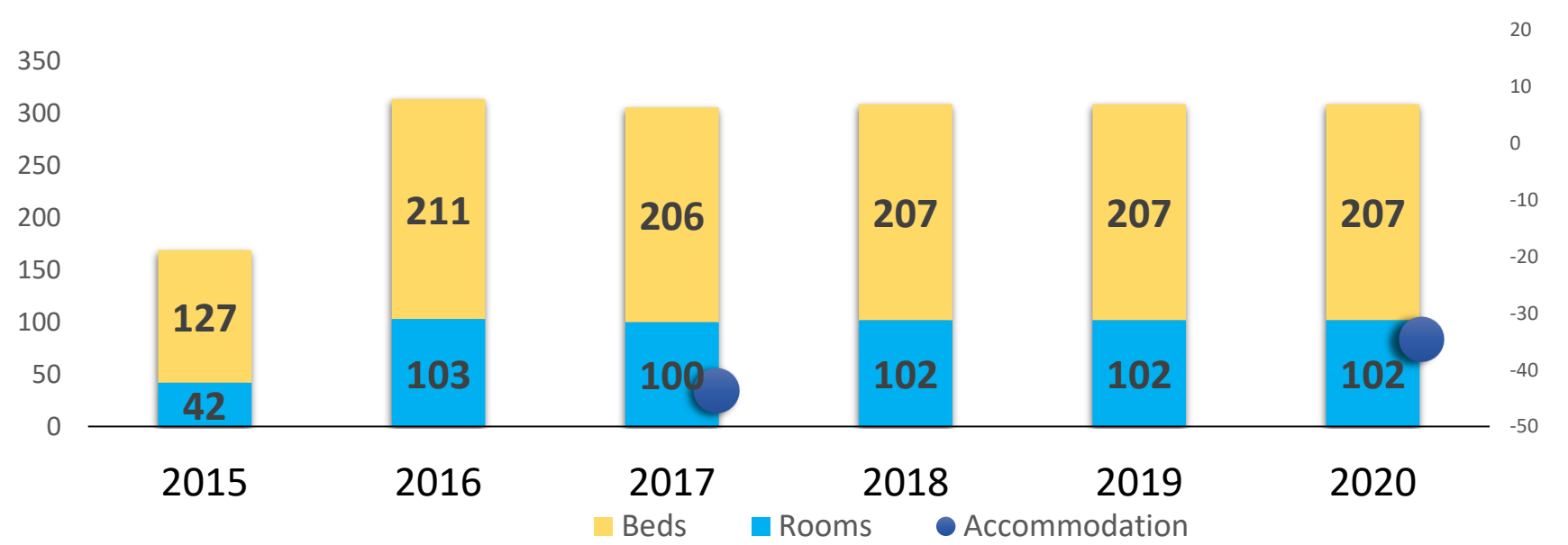
a) Hotel, Resort & Apartment



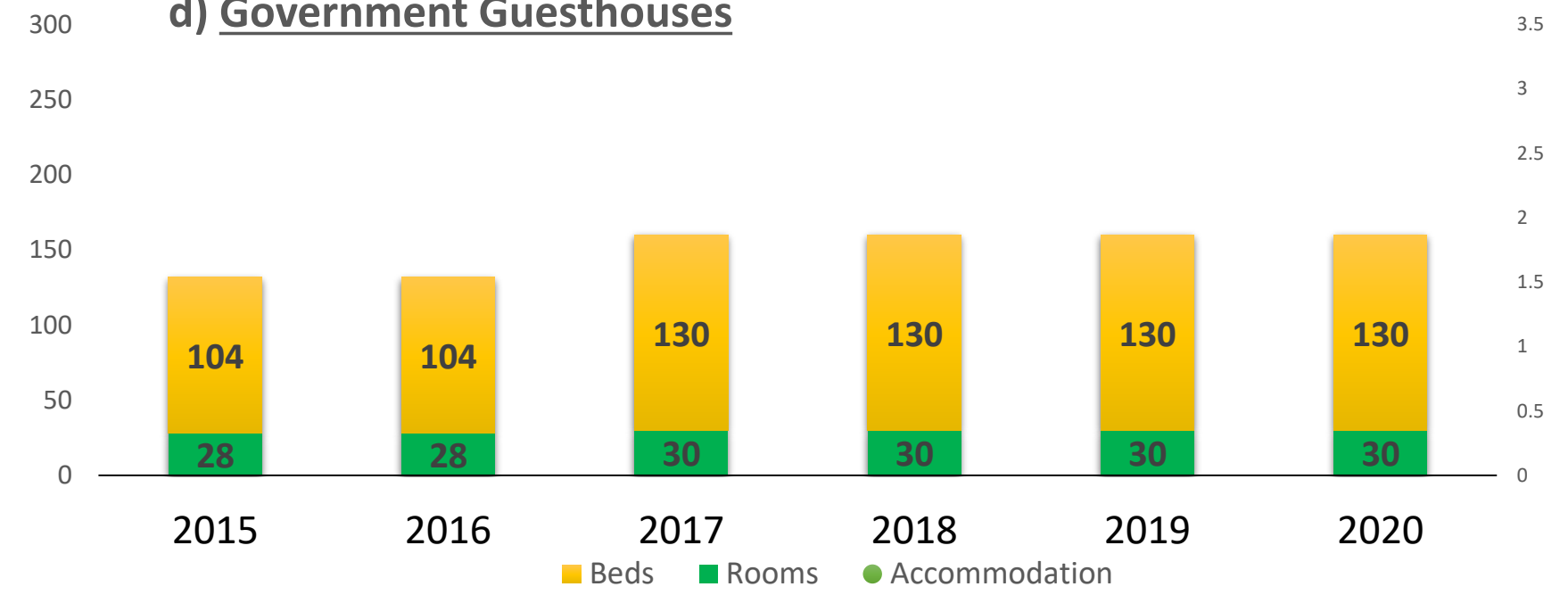
b) Guesthouses & Lodging



c) Homestays



d) Government Guesthouses



Definition:

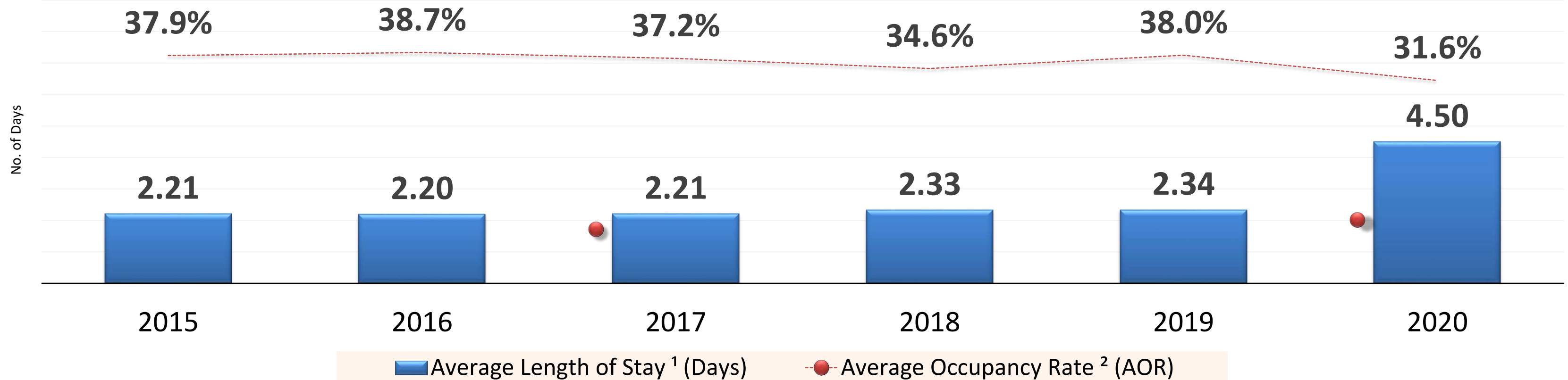
a) **Hotels, Resort & Apartments:** Accommodation for tourists or guests for hire or any other form of reward that offers professional service and for Resorts is situated in a suitable location free of noise, atmospheric and marine pollution. Such as (*Radisson Hotel Brunei Darussalam, The Empire Brunei and Abdul Razak Hotel Apartment*);

b) **Guesthouses & Lodging:** Accommodation provided in a private house or commercial building run by the owner. Such as (*Nazira Guesthouse, Freme Rainforest Lodge House and Sumbiling Eco Village*);

c) **Government Guesthouses:** Accommodation provided in a private house or commercial building run by the Government. Such as (*Pusat Belia and Rumah Persinggah Kerajaan*);

d) **Homestays:** A form of hosted accommodation at a residence where guests will stay with the host's family and experience the everyday way of life of the family and community. Such as (*Baitul Wajihah Homestay, Kampong Sungai Matan Homestay and Kunyit 7 Lodge*)

LENGTH OF STAY AND OCCUPANCY RATE, 2015 - 2020



Note:

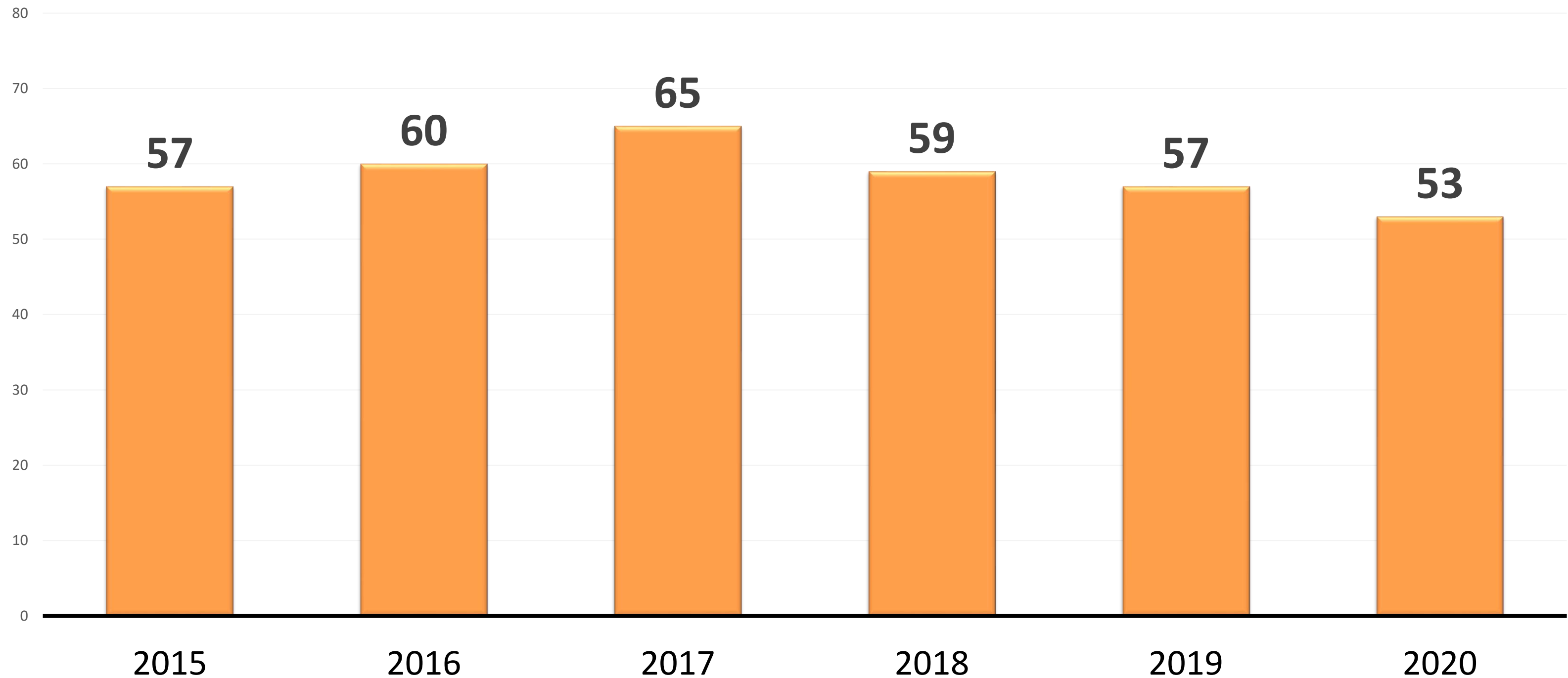
¹ Based on air arrivals and tourists staying at hotels only
(Overall purpose of visit)

² 2015 – Based on 33 accommodations only
2016 – Based on 22 accommodations only
2017 – Based on 24 accommodations only
2018 – Based on 29 accommodations only
2019 – Based on 27 accommodations only
2020 – Based on 25 accommodations only

Performance Comparison on Sales and Occupancy Rate for Accommodations in Brunei Darussalam 2019/ 2020

Similar Establishments (24 Accommodations only)	2019	2020	Growth Rate
i. SALES	\$58.3 million	\$36.0 million	-36.4%
ii. OCCUPANCY RATE	38.8%	31.6%	-18.6%
iii. TOP FIVE (5) OCCUPANCY RATE	57.9%	53.9%	-6.9%

TRAVEL AGENTS, 2015 - 2020

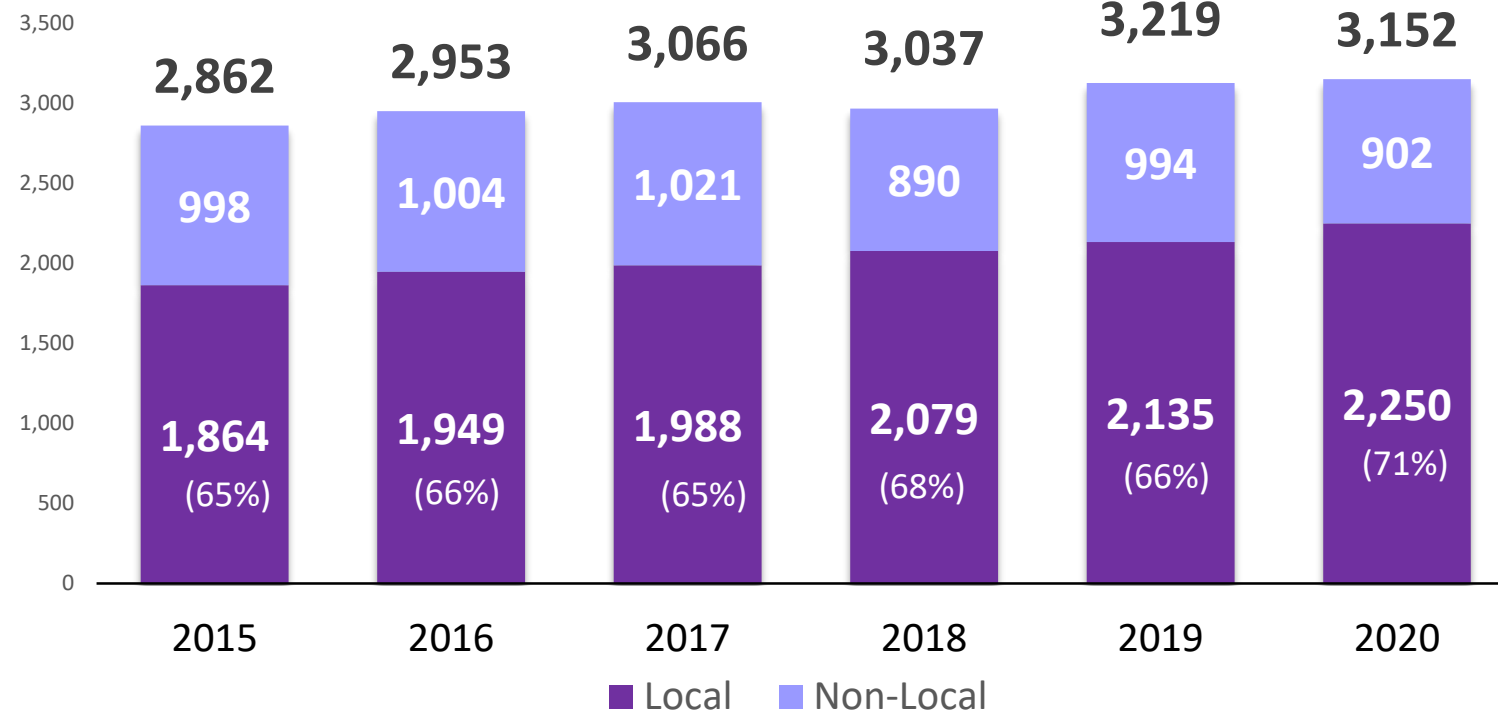


Note:

Number of registered Travel Agents under the Tourism Development Department are based on inbound and outbound travel.

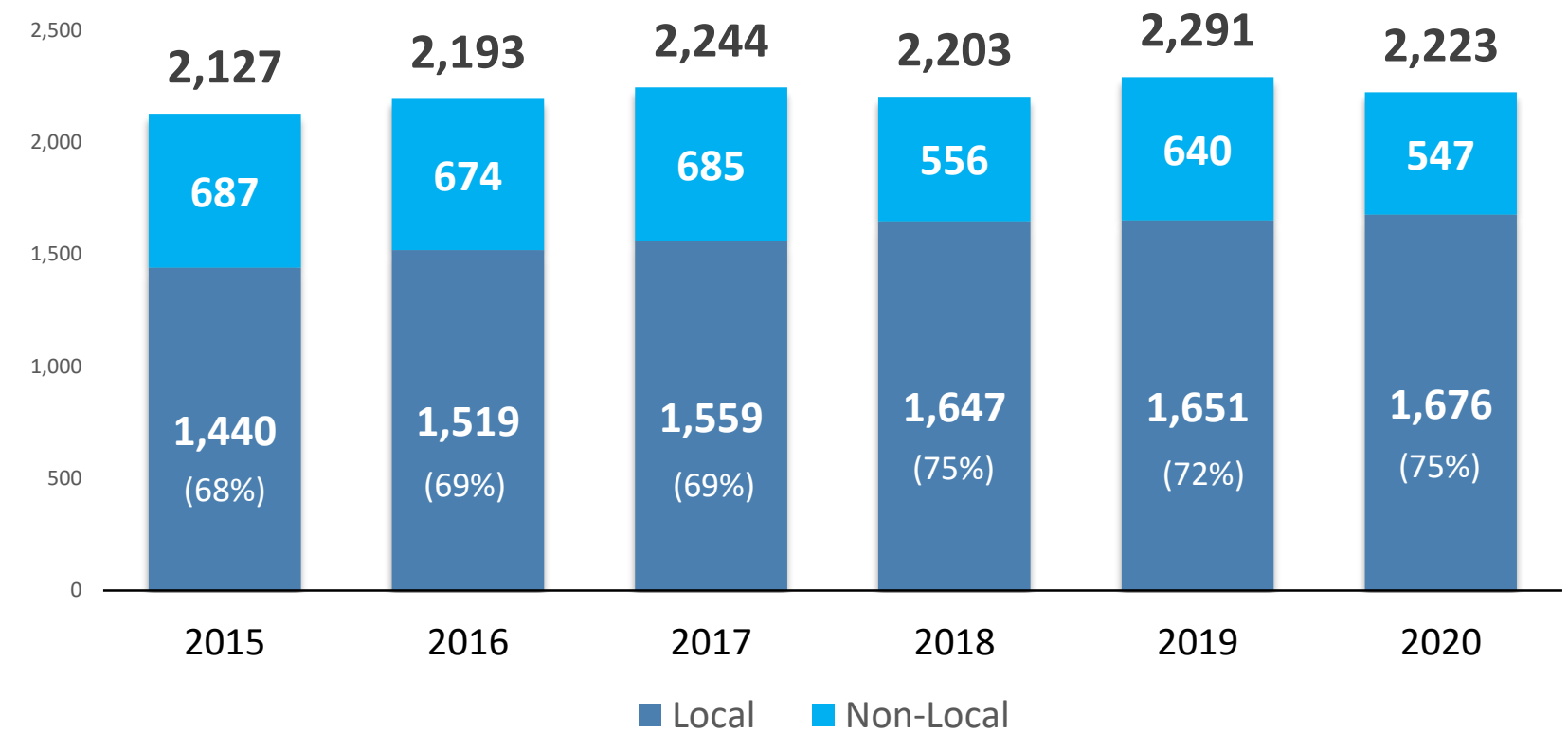
EMPLOYMENT, 2015 - 2020

Total Direct Employment

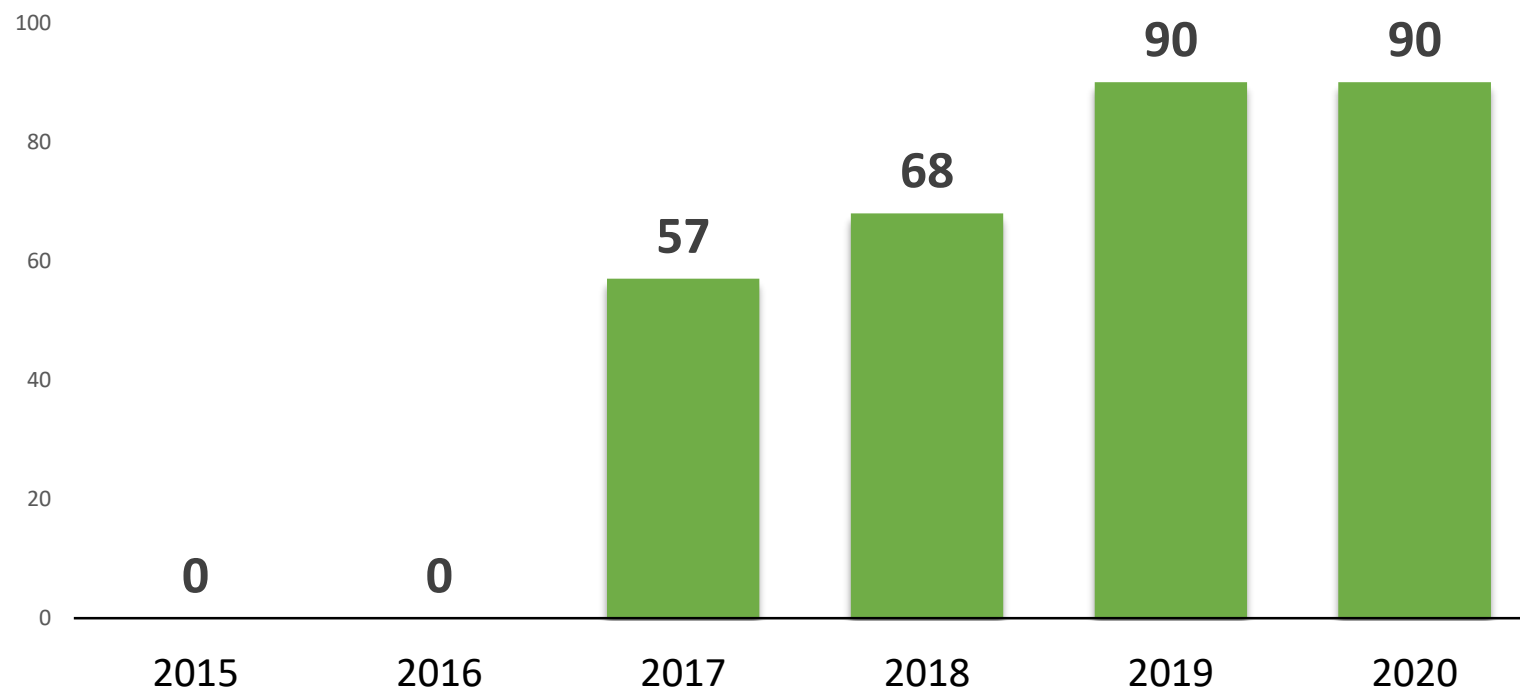


Note: Based on Accommodation, Travel Agents and Tour Guide Freelance

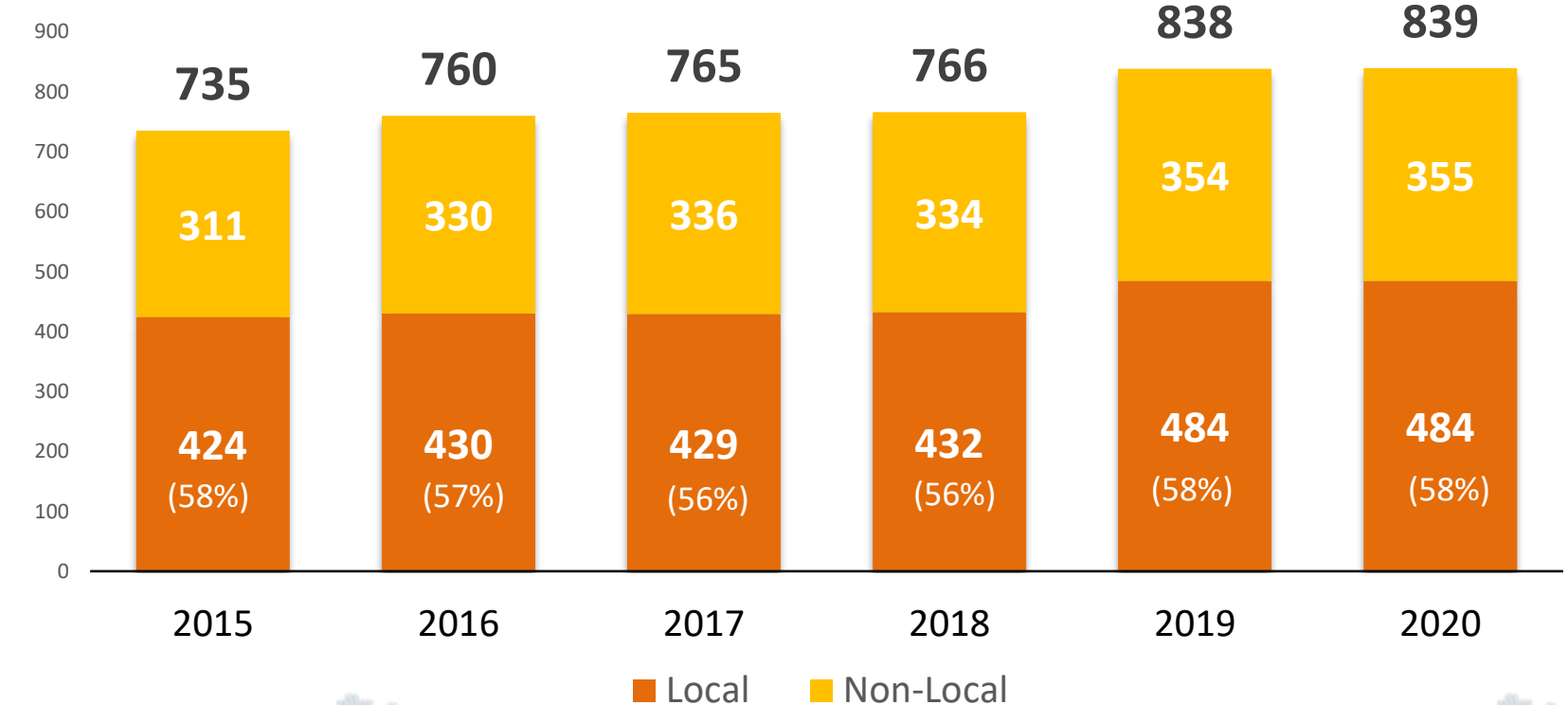
Accommodation



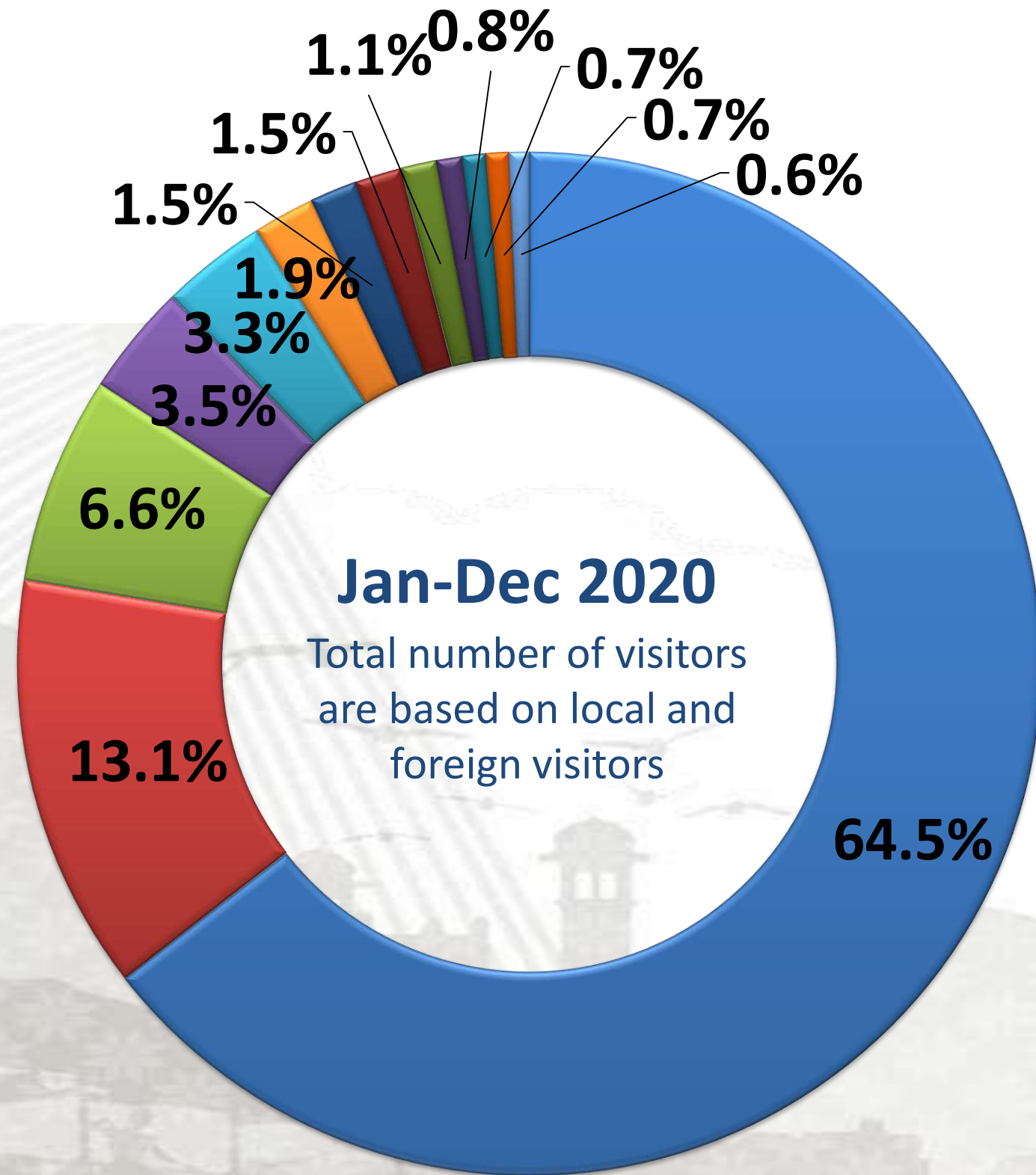
Local Tour Guide Freelance



Travel Agents



PLACES OF INTEREST IN BRUNEI DARUSSALAM, 2020



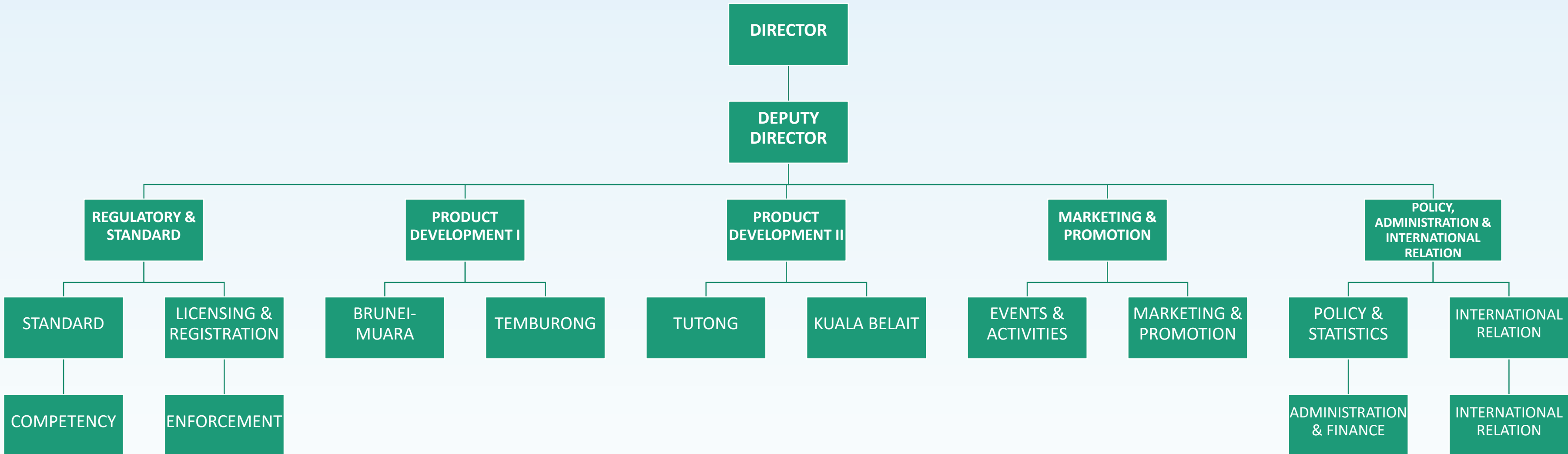
- Jerudong Park Playground (145,885)
- Royal Regalia Museum (29,735)
- Malay Technology Museum (14,892)
- Ulu Temburong National Park (7,936)
- Maritime Museum (7,571)
- Kg Ayer Cultural & Tourism Gallery (4,373)
- Sports Gallery SHHB, Berakas (3,381)
- Brunei History Centre Gallery (3,337)
- Sumbiling Eco Village (2,545)
- Kota Batu Archaeological Park Information Centre (1,844)
- Kuala Belait Museum (1,690)
- Tutong CBET sites (1,635)
- Tasek Merimbun Cultural Heritage (1,423)



ORGANISATION STRUCTURE



ORGANISATION STRUCTURE

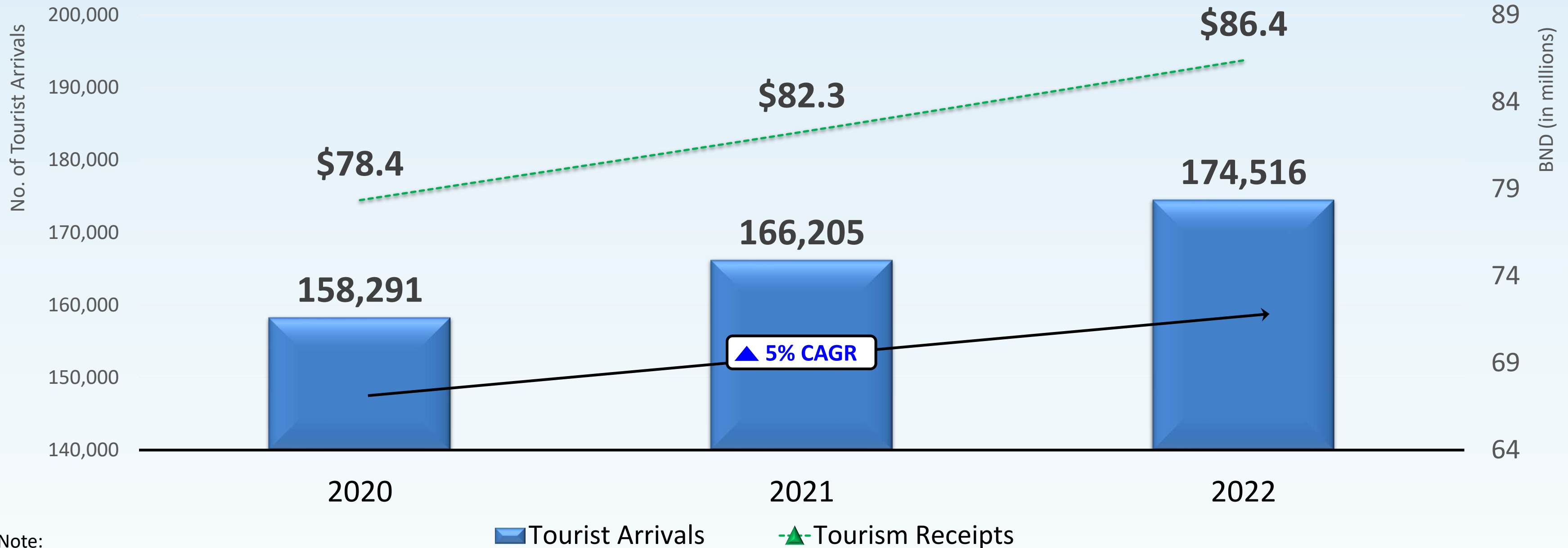




PROJECTION 2020-2022



INTERNATIONAL TOURIST ARRIVALS IS EXPECTED TO GROW BY 5% CAGR FROM THE YEAR 2020 – 2022

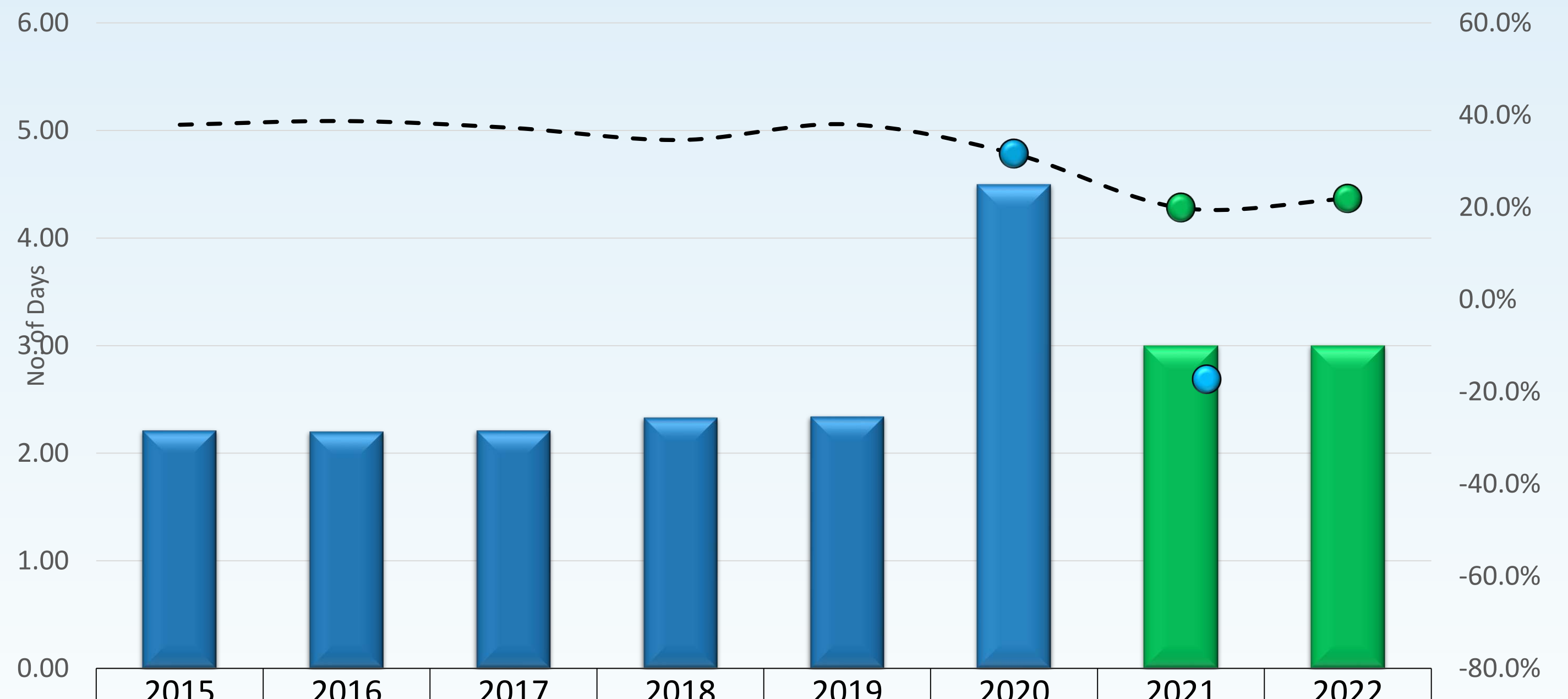


Note:

1. The data are based on air arrivals only;
2. Tourism Receipts are based on number of Tourist Arrivals, Average Length of Stay and Spending per day;
3. The projection towards the year 2022 are based on: 1. Increase in capacity of airport, 2. Increase in capacity of accommodation, 3. Increase of flight frequencies and connectivity, 4. Increase of new flights to Brunei Darussalam, 5. Increase of occupancy rate at tourist accommodation premises, and 6. Cohesive cooperation with tourism stakeholders in improving the tourism industry in Brunei Darussalam; and
4. CAGR = Compound Annual Growth Rate.

Sources: Tourism Development Department, Ministry of Primary Resources and Tourism; and Immigration and National Registration Department, Ministry of Home Affairs.

OCCUPANCY RATE AND LENGTH OF STAY AT THE TOURIST ACCOMMODATION PREMISES FROM THE YEAR 2015 – 2022



Average Length of Stay	2.21	2.20	2.21	2.33	2.34	4.50	3.00	3.00
Average Occupancy Rate	37.9%	38.7%	37.2%	34.6%	38.0%	31.6%	19.9%	21.9%

Actual Data Projection

Sources: Tourism Development Department, Ministry of Primary Resources and Tourism; and Accommodations in Brunei Darussalam.



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